

**Saving Gateway  
Reminder Questionnaire  
Final Version (4 May 2005)**

Good morning / afternoon / evening. Can I speak to [INSERT NAME FROM SAMPLE]

My name is ... and I'm calling from MORI, the independent research agency. You recently spoke to one of my colleagues regarding a new saving account being offered by the government, called the Saving Gateway. At that time, you said that you'd like more information about the account and how it actually worked and asked us to send you a pack and application form.

Q1. Can I just check – did you actually receive the 'Saving Gateway' pack that we sent you in the post? IF NECESSARY ADD: The pack would have contained a small A5 brochure and application form, with a branch and green leaves on the cover, an invitation letter to take part in the scheme and a questionnaire.

Yes	1	Go to Q3
No	2	Go to Q2
Don't know/can't remember	3	Go to Q2

Q2. Would you like me to send you another Saving Gateway Pack?

Yes	1	Go to Q ADDRESS & then Q11
No	2	Go to Q2B

IF DO NOT WANT ANOTHER PACK (CODE 2 AT Q2)

You can only open a Saving Gateway account if invited to do so. The letter contained in the pack is proof that you have been invited to open an account. You need this letter in order to open the account.

Q2B Are you sure you do not want to receive another pack?

Yes	1	GO TO Q2C
No, not sure	2	GO TO Q ADDRESS & THEN Q11

IF SURE THEY DO NOT WANT ANOTHER PACK (CODE 1 AT Q2B)

Q2C Can I just ask, why don't you want to be sent another pack?  
PROBE FULLY AND WRITE IN.

None/no answer

Don't know

GO TO Q10 & SKIP Q11. CLOSE

IF RECEIVED PACK (CODE 1 AT Q1)

Q3. Have you opened or made an appointment to open a Saving Gateway account at one of the participating Halifax branches yet?

Yes - opened	1	GO TO Q4
Yes – made appointment		GO TO Q4
No – Not yet	2	GO TO Q7
Tried to but experienced problems	3	GO TO Q4

IF OPENED AN ACCOUNT OR TRIED TO BUT PROBLEMS (Q3 CODE 1 OR 3)

Q4. When did you (try to) open the account? IF MADE APPOINTMENT, RECORD WHEN THEY MADE THE APPOINTMENT (& NOT WHEN THE APPOINTMENT IS FOR)  
READ OUT

In the last 3 days	1	ASK Q5
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<b>In the last 7 days</b>	2
<b>Last 14 days</b>	3
<b>Longer than that</b>	4

IF OPENED AN ACCOUNT OR TRIED TO BUT PROBLEMS (Q3 CODE 1 OR 3)

Q5. **At which Halifax branch did you (try to) open your Saving Gateway account?**  
INSERT BRANCH CODES WITH LOOKUP DEFINED BY AREA

Don't know

IF OPENED AN ACCOUNT, THANK AND CLOSE, OTHERS TO Q6

IF TRIED TO OPEN BUT EXPERIENCED PROBLEMS (CODE 3 AT Q3)

Q6. **What problems did you experience when you tried to open the saving Gateway account?**  
PROBE FULLY

Don't know

IF HAVEN'T OPENED AN ACCOUNT YET (CODE 2 AT Q3)

**There are only a limited number of Saving Gateway accounts available and these are being offered to the public on a 'first come first served basis'.**

Q7. **Do you intend to open a saving gateway account?**

Yes	1	GO TO Q8
No	2	GO TO Q9 & Q10 (SKIP Q11 & CLOSE)
Don't know/ undecided	3	ASK Q7A

IF TRIED BUT EXPERIENCED PROBLEMS (CODE 3 AT Q3)

**There are only a limited number of Saving Gateway accounts available and these are being offered to the public on a 'first come first served basis'.**

Q7aa **Do you still intend to open a saving gateway account?**

Yes	1	GO TO Q8 & then Q11
No	2	GO TO Q10 (SKIP Q11 & CLOSE)
Don't know/ undecided	3	GO TO Q11

IF UNDECIDED (CODE 3 AT Q7)

Q7a. **Why do you say that?**  
PROBE FULLY

**That's fine. Just remember that these accounts are part of a pilot scheme being offered for a limited time only and to a small group of individuals who qualify. If you do wish to take advantage of the Saving Gateway scheme, we would recommend that you do so as soon as possible. NOW GO TO Q11**

IF INTEND TO OPEN AN ACCOUNT (CODE 1 AT Q7)

Q8. **When do you plan to open the account?**  
READ OUT

<b>This weekend</b>	1	GO TO Q11
<b>The next 7 days</b>	2	
<b>The next 2 weeks</b>	3	
<b>The next month</b>	4	
<b>Longer than that</b>	5	

IF DO NOT INTEND TO OPEN AN ACCOUNT (CODE 2 Q7)

Q9. **What made you decide not to open a Saving gateway account?**

DO NOT READ OUT. PROBE FULLY

The scheme was too complicated	1	
Wasn't as good as it sounded on the phone	2	
Wasn't eligible when I looked at scheme in more detail	3	
Can't afford it	4	ASK Q10
Just changed my mind	5	
Branches were too far away	6	
Personal circumstances have changed since initial call	7	
Other (specify)	8	

We are still interested in your views and attitudes towards saving as part of the research we are doing for the Department for Education and Skills and the Treasury. Would it be possible to re-contact you in six months time about this?

Again I would like to assure you that all the information we collect will be treated in the strictest confidence by the research team and used for research purposes only. It will not be possible to identify any particular person, household or address in the results and it will not affect any current or future dealing you have with any government department.

Q10. **Would you be willing to talk to us as part of this research? We will of course write to you nearer the time to confirm you would still like to be involved and you can refuse to take part at any point.**

Yes	1	CHECK ADDRESS
No	2	CLOSE

Q ADDRESS **Can I confirm the address we have for you is:**

[INSERT ADDRESS DETAILS]

CHANGE / AMEND IF NECESSARY

**Thank you very much for taking the time to speak to us again.**

CLOSING STATEMENTS:

IF NOT PARTICIPATING IN SCHEME BUT AGREED TO FOLLOW-UP AT Q10 ADD **...and agreeing to take place in the further research. We will write to you in the next few months to let you know when the follow-up research is taking place.**

IF SENDING OUT ANOTHER PACK ADD...**We will put another pack in the post in the next week or so.**

Q11. **MORI may be conducting research on similar issues for the Treasury and Department for Education & Skills in the near future. May we recontact you again to ask you to take part?**

Yes	1
No	2

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**THANK AND CLOSE**